Department of Defense

Performance Appraisal Application (PAA)

Version 2.0

September 2007

- Performance Appraisal Application (PAA) Version 2.0, the web-based tool that supports the performance planning and appraisal process of NSPS, is now accessible via *My Biz* or *My Workplace* in the Defense Civilian Personnel Data System (DCPDS).

- Developed based on user feedback, PAA Version 2.0 provides managers (higher-level reviewers), supervisors (rating officials), and employees with new features that make the PAA more user friendly.

- This presentation reviews the major enhancements included with PAA Version 2.0
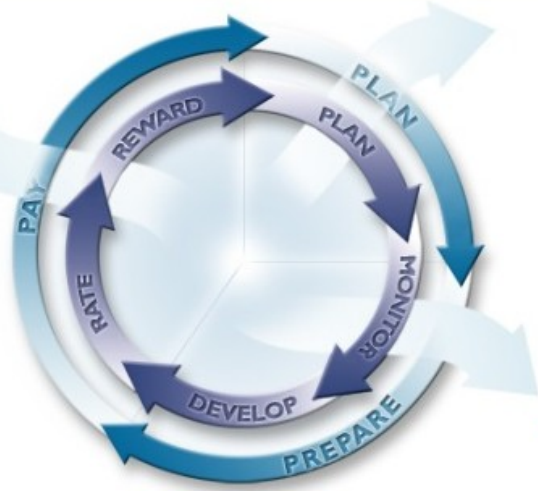
NSPS

Performance Appraisal Application (...)
Version 2.0

Home Logout Preferences Personalize Page

Go to Main Page

Navigation improvements: Action buttons are always at the right side of the screen, both top...

Welcome to the
Performance Appraisal Application (PAA)

Version 2.0

PAA is your online performance management tool. With easy to navigate functionality, a built in help feature and **Quick Guides** that offer step-by-step instruction on how to complete key activities, you can effectively plan, monitor, rate and reward performance under NSPS.

Non-NSPS employees are encouraged to develop their NSPS Performance Plans prior to their positions converting. Upon conversion, you may work with your Rating Official to finalize and approve your Performance Plan.

Go to Quick Guides

Quick Guides are short, helpful guides for common performance management tasks (creating a performance plan, conducting an interim review, etc.)

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DCPDS
DEFENSE CIVILIAN
PERSONNEL DATA SYSTEM

...and bottom

Go to Main Page

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Performance Appraisal Application (PAA)
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MyBiz Suggestions

Quick Guides and Helpful Hints

Helpful Hints
Lifecyle in the PAA

Quick Guides are arranged by role (employee, rating official, higher level reviewer) and task (e.g., create a performance plan)

Step-by-step Quick Guides make completing key acti

✓ Short in length -- no more than two pages
✓ Easy to read
✓ Easy to print

Employee Quick Guides

Create a Performance Plan
Add/Delete/Update Job Objectives
Transfer to Rating Official
Acknowledge a Performance Plan
Interim Review
Closeout Assessment
Self Assessment for Annual Appraisal

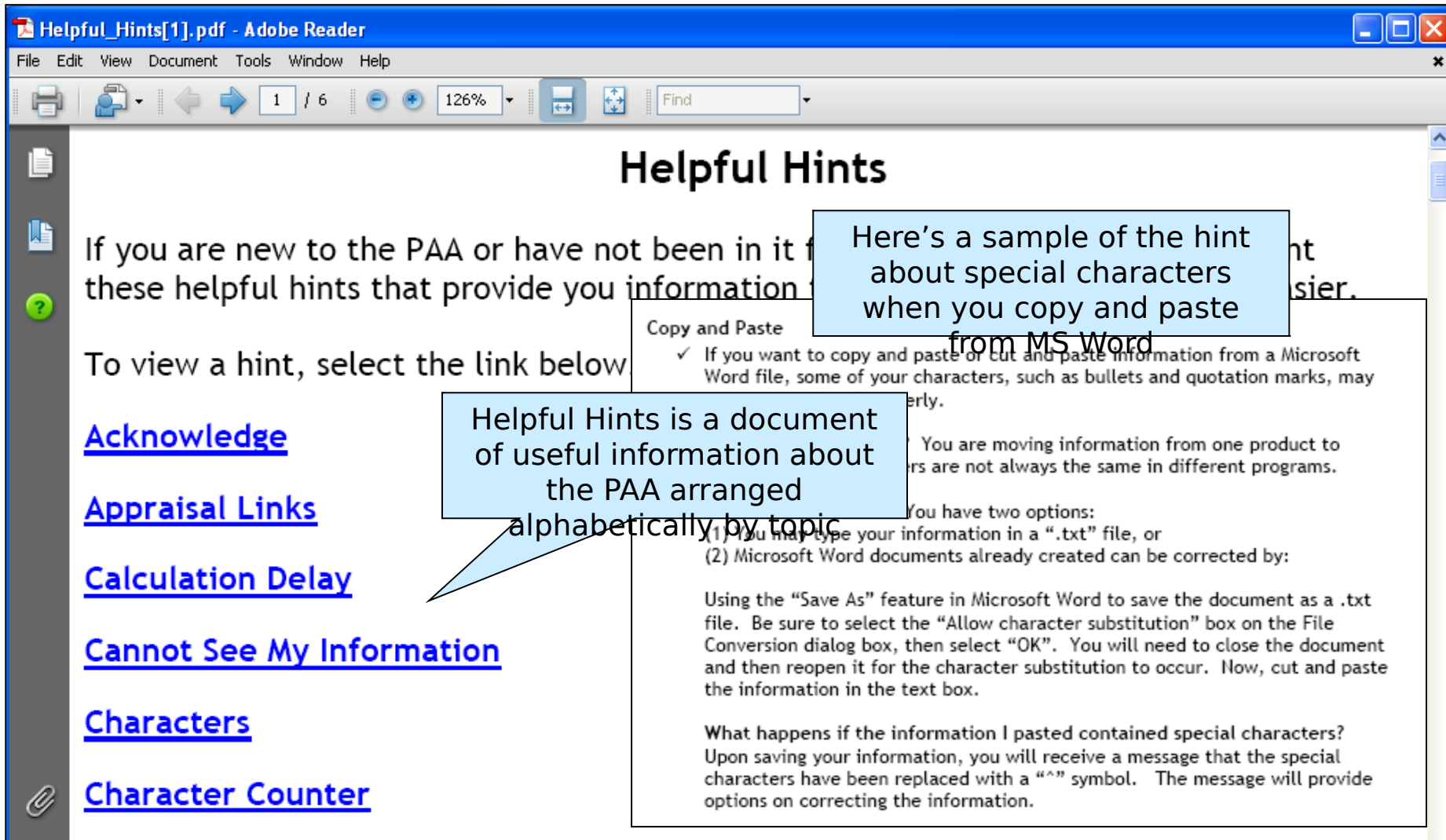**Rating Official Quick Guides**

Create a Performance Plan
Update a Performance Plan
Acknowledge and Approve a Performance Plan
Interim Review
Closeout Assessment
Retrieve or Transfer
Submit a Recommended Rating

Higher Level Reviewer Quick Guides

Manage Performance Plans/Appraisals

As a reminder, be sure to consider any Component and organization guidance that may influence how you complete the PAA.

Helpful Hints

Here's a sample of the hint about special characters when you copy and paste from MS Word

Helpful Hints is a document of useful information about the PAA arranged alphabetically by topic

Lifecycle in the PAA

This is the Lifecycle of the performance management process as reflected in the PAA. It's available through the "Lifecycle in the PAA" link on the Quick Guides page.

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For Rating Officials

Create a Performance Plan

Complete these steps to create a Performance Plan:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the Create button next to Performance Plan on the top right side of the page to view the *Create Performance Plan: My Rating Hierarchy* page.
3. Select the icon in the Create column to the right of the employee's name to view the *Create Performance Plan: Setup Details* page.
4. Review and make any necessary change(s) to the default values.
5. Select the Next button to view the *Create Performance Plan: Overview* page.
6. Enter information in the Relevant Organizational Mission/Strategic Goals field.
7. Select the Add Objective button to view the *Add Job Objective* page.
8. Enter information into the Objective Number and Objective Title fields.
9. Enter draft Job Objective text into the Job Objective field.
10. Select the Contributing Factor(s) that apply to the Job Objective.

Here's an extract from a Quick Guide – this one shows the steps for creating a performance plan by a rating official. All the Quick Guides are short (none over 2 pages) and can be printed or left open on your screen as you work through the task.

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This is the re-named "Main Page"

Performance Appraisal Application (PAA)

MyBiz Sugge... ...ome Logout Preferences Oracle Help Diagnostics

If you are a Higher Level Reviewer (HLR) you can filter this list to just show your HLR appraisals

Help and Quick Guides links

Performance Appraisal Application Main Page

Need Help?
Quick Guides

You can also filter to show only one year

Plans/Appraisals in Progress

Show Me [All Appraisals ▼] Appraisal Year [ALL ▼]   [Performance Plan ▼] (Create)

Table Size [10 ▼]

Employee Name	Created by	Current Owner	Appraisal Year	Plan Approval Date	Plan Status	Appraisal Status	View	Update	Delete	Close	Print
Pichette, Bert I	Averette, Les M	Ave... ...M	2008	02-Feb-2007	Modified	Ongoing	📋	✏️	🗑️	✖️	🖨️

▶ Show Completed Plans/Appra...

And you can decide how many records to show per screen (up to 25)

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Performance Appraisal Application (PAA)
Version 2.0

MyBiz Suggestions   Home   Logout   Preferences   Oracle Help   Diagnostics

Notifications   **Appraisals**

Main Appraiser

Performance Appraisal Application Main Page

Need Help?
Quick Guides

- New columns have been added ("Current Owner," "Appraisal Year")
- Other columns have been renamed ("View," "Update")
- Sort on any column by clicking the column header

Plans/Appraisals in

Show Me   All Appraisals ☑   Performance Plan ☑   (Create)
Table Size   10 ☑

Employee Name	Created By	Current Owner	Appraisal Year	Plan Approval Date	Plan Status	Appraisal Status	View	Update	Delete	Close	Print
Pichette, Bert I	Averette, Les M	Averette, Les M	2008	02-Feb-2007	Modified	Ongoing	🖥	✏	🗑	✖	🖨

▶ Show Completed Plans/Appraisals

New printing functionality (see next screen)

Completed Plans and Appraisals do not show by default; click the link to access them

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Diagnostics

Print Appraisal Information

Return to Main Page

Employee Name **Pichette, Bert**

Select just the sections that you want to print…

View/Print Selected Sections

Selecting the "View/Print Selected Section___ ___ __ allows you to print the selected sections. This is not an official DD Form 2906.

☐ **Select / Deselect All**
- ☐ Relevant Organization Mission/Strategic Goals
- ☐ Job Objectives
- ☐ Employee Self-Assessment for Interim Review
- ☐ Rating Official Assessment for Interim Review
- ☐ Employee Self-Assessment for Closeout Assessment
- ☐ Rating Official Assessment for Closeout Assessment

- ☐ Employee Self-Assessment for Annual Performance Appraisal
- ☐ Rating Official Assessment for Annual Performance Appraisal
- ☐ Component Unique Information
- ☐ Performance Rating, Shares, and Payout Distribution
  - ☐ Performance Ratings
  - ☐ Shares
  - ☐ Payout Distribution

View/Print Selected Section(s)

View/Print Form

Selecting the "View/Print Form" button allows you to print the Performance Plan, Interim Review(s)/Closeout Assessment, and Annual Performance Appraisal (DD Form 2906).

…or print the whole DD Form 2906

View/Print Form

Return to Main Page

Performance Appraisal Application (PAA)
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MyBiz Suggestions   Diagnostics   Home   Logout   Preferences

Rating Official Review

(Change Rating Official)   (Transfer to Employee)   (Update Plan/Appraisal)   (Submit Recommended Ratings)

Need Help?

Employee Information

Employee Name   **Bert Pichette**

▶ **Show Employee Details**
▶ **Show Placement in Pay Band**

▶ **Show Setup Details**
▶ **Show Relevant Organizational Mission/Strategic Goals**

Job Objectives

Show All Details | Hide All Details

Details	Number	Title	Status	Optional Weight (%)	Adjusted Weight (%)	Rating	Contributing Factor Impact	Adjusted Rating
▶ Show	1	Obj 1 Special Projects	APPROVED	40				
▶ Show	2	Obj 2 Training Delivery	APPROVED	40				
▶ Show	3	Obj 3 Advisory Services	APPROVED	20				

Sections of the appraisal are hidden unless you want to see them (reduces clutter and scrolling)

Job objectives now have numbers that you control

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Need Help?

Rating Official Review

Use this page to navigate to different functions as it pertains to the Performance Plan/Appraisal process.

Approval and acknowledgement of the Performance Plan is located on this page. The ability to conduct Interim Reviews and Closeout Assessments becomes available after the Performance Plan has been approved. To update any other area, select the **Update Plan/Appraisal** button.

Return to Main Page, located in the lower left hand corner of the page, returns you to the *Performance Appraisal Application Main Page*.

TIPS!
- **Need Help?** Defines buttons and areas found on this page.
- Step-by-step instructions on how to plan, update and rate performance may be found through the Quick Guides.
- The term Appraisal includes Performance Plan.
- If a plus or minus sign appears next to a link, select the sign to show or hide information.

Buttons
Employee Information Area
Job Objectives Area
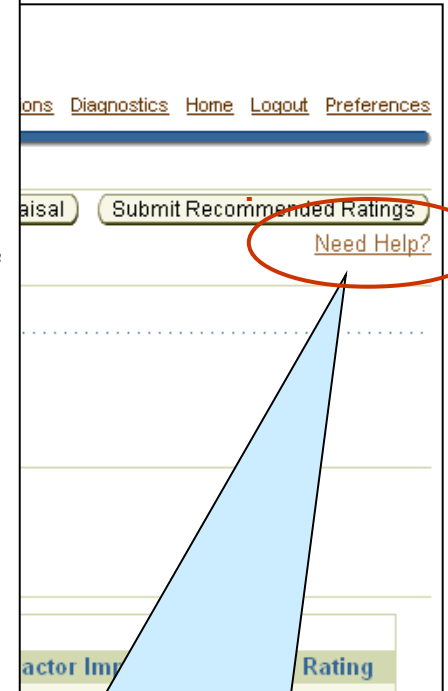**Approvals and Acknowledgements / Performance Plan Area**
Interim Review Area
Closeout Assessments Area
Employee Self-Assessment for Annual Appraisal Area
Rating of Record and Assessment Area

ons   Diagnostics   Home   Logout   Preferences

aisal)   (Submit Recommended Ratings)
Need Help?

actor Imp   Rating

"Need Help?" screens provide context-sensitive help for each screen

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Approvals and Acknowledgements now have step-by-step guidance to walk you through the process in the correct sequence, and the system will not allow you to take a step out of sequence (buttons remain inaccessible until the right time)

You have two options for obtaining higher level review:*
Option **A** – Transfer the plan to the HLR, **OR**
Option **B** – Document that the higher level review took place by entering the date and method of the review

In those cases when the employee does not have access to acknowledge the appraisal in the PAA (e.g., extended sick leave, deployment in theater), you can document in the PAA that you communicated the appraisal to the employee by other means

Approvals and **edgements**

Performance Plan

Step 1 - Higher Level Review: There are two options available to complete
- Option A: Transfer to the Higher Level Reviewer (HLR) in the PAA
OR
- Option B: Document the higher level review has taken place by entering the following information:

Review Date
Method of Review   PAA

Higher Level Review Status: These fields are auto populated based
Status	Date
APPROVED	02-Feb-2007

Step 2 - Document communication of performance plan to employee:
☑ TIP Communication Date entered will be used to populate the Performance Plan Approval Date.
Communication Date **01-Feb-2007**   Communication Method **Face to Face**   Other

(Save and Transfer to Employee for Acknowledgement) (Save and go to Step 3)

Step 3 -Employee Acknowledgement: If the plan was transferred to the employee for acknowledgement, these fields are auto-populated at the time the employee acknowledges. However, if the employee is not available for acknowledgement, enter the acknowledgement manually.
Acknowledgement **OTHER**   Other   Date

(Save)

* Note: This option is available for the Performance Plan, Interim Review, Closeout Assessment, and Recommended Rating of Record

Text Blocks

Rating of Record and Assessment

Average Score
Rating of Record
Rating Official Assessment

> All text blocks (organization mission, job objectives, self-assessment, supervisory assessment, etc.) have been enlarged to hold more characters (see next screen) and are larger on the screen to reduce the need for scrolling when reviewing

> Maximum size of each text field is displayed

> Text blocks also have a character counter so you can see how close you are to the maximum size

(Limit to 8000 characters)   Counter

Component Unique Information

> The Component Unique Information block can be updated by the RO and/or HLR

(Limit to 4400 characters)   Counter

Text Field	Former Size	New Size
Organization Mission / Goals	1,000	1,400
Job Objective	770	1,000
Employee Self-Assessment	6,600	8,000
Supervisory Assessment	2,000	8,000
Interim/Closeout Assessments (supervisory and employee)	2,000	4,000
Component Unique Info	2,000	4,400

When printing the DD Form 2906, any text that does not fit within the existing blocks on the form (former sizes) will print on separate pages at the end of the form (up to the new size limitations)

Rating of Record and Assessment

Average Score	3.3
Rating of Record	**3-Valued Performer**
Shares	2 ▾
Payout Distribution Split	
Salary Increase %	48
Bonus %	52

When submitting the recommended rating of record, the RO can also select recommended number of shares (based on the recommended rating) and the distribution of the payout between a salary increase and bonus

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PAA Version 3

- PAA version 2 is not the "end state" of the PAA
  - In the interest of a quick fix, version 2 focused on changes that could be made quickly within the existing system architecture and short development timeline

- Version 3 will be a reconstruction, with such proposed changes as:
  - Tabbed screens to distinguish between major events (creating the performance plan, interim review, final rating, etc.) and "wizard-like" functionality
  - Totally redesigned PAA "Main Page" to help you navigate through the system
  - Assessment blocks co-located with each job objective
  - Ability to re-use job objectives and assessments from prior rating cycles
  - A redesigned simpler and shorter 2906 form
  - Better system and data administration and reporting functionality
  - Smarter functionality (Need Help?, text counters, numbering, etc.)

- Anticipated delivery is August 2008